

RePod

Bridging European podcast markets

CHAPTER 1: INTRODUCTION

1. A critical view on the podcasting industry in Europe

Over the past five to ten years, podcasting in Europe has undergone a tremendous boost in terms of the number of podcasts released, increase of listenership and, therefore, economic value. According to eMarketer, between 2019 and 2022, podcast listeners from 9 key countries across Europe increased from 55.5 to 83.8 million¹. eMarketer estimates suggest that by 2024, this number could reach around 105 million podcast listeners across these key countries. The growth from 2019 to 2024 represents an almost 90% increase over five years.

Notwithstanding this upward trend, the European audio and podcast market appears to be lagging behind the US. This is surely linked to the fact that the podcast format was developed earlier in the US. However, other structural factors can be understood as endogenous limits to the development of the European podcast market.

This report focuses on one of the main factors, that is: the multiplicity of languages spoken across Europe. Whereas video can rely on the universal power of images and hinge upon subtitling as an effective and relatively low cost solution to this challenge, podcasting appears to be more of a spoken language-bound medium. In other words: the coupling of cultural- and medium-specific factors can be interpreted as putting a cap to the development of the European podcast industry in the long run.

All in all, from a variety of perspectives (micro and macro), the European podcast market is in dire need of border-breaking production experiments. But before that, the industry needs intelligence about how different European podcast markets were born, function today, and could develop in the near future.

This report aims at kicking-off strategic discussions on podcasting in a European cross-border fashion. To do so, it brings to the fore qualitative expertise on the national production landscapes, as well as sketches of experimental production-projects. Eventually, this document focuses on the rise of AI-driven technologies in podcast production. This paper is named after an homonymous European project, which is described in the following section.

¹ Data from Denmark, France, Italy, Sweden, the UK, Finland, Germany, Norway and Spain.

2. RePod – European podcasting

In the context of a booming podcasting sector, the RePod project aimed at bridging different European national podcast markets and exploring new potential business models for podcast-focused companies and media. In light of the fragmentation of different European podcast markets outlined in the previous section, RePod – European podcasting (for simplicity “RePod”, hereafter²) pursued its objective through three specific project-strands and deliverables:

- A report dealing with the state of the art of the four biggest European podcast markets (the UK, France, Spain and Italy) in terms of key events, players and general characteristics.
- The production of an homonymous podcast series, [RePod](#), featuring discussions with podcast professionals as well as a focus on themes which are deemed to be pivotal for the development of the industry (AI).
- The remake of a podcast series, originally produced in English – *The Santiago Boys* – into French³.

RePod was executed by the Brussels-based European podcast agency, Europod⁴, and Acast, a global leader in hosting and monetisation of podcasts. The project was financed by the 2022-2023 edition of Stars4Media: an innovation exchange programme aiming at facilitating cooperation between media professionals, and accelerating media innovation and cross-border coverage in Europe.

Stars4Media is managed by Fondation Euractiv’s Europe’s Media Lab, in partnership with Vrije Universiteit Brussels (VUB), the World Association of News Publisher (WANIFRA), the European Federation of Journalists (EFJ) and the European Journalism Centre (EJC). The programme is co-founded by the European Commission.

3. About Europod and Acast

² Special mention to James Cridland from Podnews who suggested further specifying the object of RePod through the byline “European podcasting”.

³ The original series was produced by the leading Italian podcasting company, Chora Media (Be Content).

⁴ Formerly Bulle Media.



Europod is the leading European podcast production agency based in Brussels, Belgium. Born in 2018, the agency has served clients such as European institutions, NGOs, think tanks, research organisations and others, helping them to start and run their podcast projects.

Europod's long-term mission is to develop the European podcast market, with a multilingual and cross-border perspective. In 2024, Europod offers production services and participates in several European projects that shape the audio industry of tomorrow. Europod hosts more than 25 podcast series, including fiction and non-fiction products and, among other things, European society and politics.



Acast is a Swedish-founded company that provides hosting, monetization and growth support for podcasts, and podcast advertising solutions for brands and media agencies. Launched in 2014, Acast's key innovation was bringing dynamic ad insertion to podcasting — allowing brands to easily place up-to-date messaging, tailored to each listener, across thousands of shows. Today, Acast is a global leader, with more than 400 employees across more than 10 national offices.

4. General outline of the document

- **Chapter 1:** Introduction
- **Chapter 2:** an analysis of 4 key European podcast markets (the UK, France, Spain and Italy), as seen through the lenses of 4 national experts in the field of podcast production. The interviews were run by Europod's staff and collaborators between the end of 2022 and the first half of 2023.
- **Chapter 3:** discusses the case study of the remake of The Santiago Boys (original language: EN) into French languages, by Europod.
- **Chapter 4:** wrap up the content of the report and sketch future developments in the podcasting industry, most notably with reference to AI technologies.
- **Annex:** The contributors to this report can be found in the credits section

CHAPTER 2: HOW DIVERSE ARE EUROPEAN PODCAST MARKETS?

1. General intro: methodology of chapter

In this chapter we provide qualitative insights into the same four key European podcast markets analysed from a listenership and advertising perspective: the UK, France, Spain and Italy.

To dive qualitatively into these markets, we invited four experts – one for each country – to answer a number of questions revolving around the history of the podcast movement, the production landscape and future challenges. The interviews were run on site as well as from remote and collected between late 2022 and the Spring 2023.

The full interviews are attached to this report as an Annex. Instead, in this chapter we re-organise the answers thematically, trying to highlight different interpretations of the state of the relative podcast industries, as well as similarities and differences.

More specifically, the next sections showcase:

- **Timelines with milestones** for the evolution of the podcast industry in each country.
- **A mapping of key producers**, leading post-production tools, awards & contests per country.
- **An overview of the state of the development** of each podcast market as well as future challenges.

2. Meet the European podcast experts

The experts interviewed for this report have worked for leading podcast organisations in their countries or are experts in podcasting. The expertise showcased in this report is also representative of different points of views on podcasting: from sound engineers to production managers, to media professionals.

What follows are the biographies, works and latest key projects of the industry experts interviewed for the RePod report.

ROBERT ABEL | United Kingdom



Robert Abel is the **Head of Podcast Business and Strategy** at **The Guardian**, the news publisher in the UK, since 2019. His role is to think about the future of audio and podcasting, and to create business plans to allow it to happen.

Before The Guardian, Robert Abel was Head of Audio at Somethin' Else from 2000 to 2019. Somethin' Else is the biggest independent audio production company in the UK since the 2010s. He had an editorial role, in charge of all of the audio production which consisted of BBC commissions, commercial radio commissions

and podcasts.

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BENJAMIN HOUR | France



Benjamin Hours served as **Head of Podcasts** at **Slate** between November 2018 and February 2023. Slate is one of the leading podcast producers in France, featuring top-listened shows on Spotify, Apple Podcast and Deezer. Slate notably produces the most listened podcast in France *Transfert*

At Slate, Benjamin Hours was responsible for the selection and validation of podcasts at all stages of their creation, from their conceptualisation to their online publication. Benjamin Hours has been behind the production of hundreds of episodes for more than twenty different podcasts (talk shows, documentaries, interviews). His duties included also coaching and supervision of podcasters and producers, the general art direction and narrative direction of the Slate 's podcasts, as well as the management of relations with platforms (Apple Podcasts, Spotify, Amazon Music, etc.) and partners (ACPM, Audion, Audiomeans, etc.).

LinkedIN: <https://www.linkedin.com/in/benjamin-hours-49791317/>

ROBERTO GARCÍA RODRÍGUEZ | Spain



Roberto García Rodríguez is Head of Productions at SER Podcast, the podcast platform of Cadena SER. Roberto García is in charge of the implementation of projects, the production of content and the development and maintenance of the SER Podcast platform.

Producer and sound designer in podcasts such as: "Agur ETA", "Clara Conquista", "Los brazos del Mediterráneo", "Cómo no te voy a querer" or "Axel Road" for SER Podcast. "Negra y Criminal", "Menlo Park", "Inés y los huevos mágicos" or "Aventuras en la Bañera"

for Podium Podcast. "La Línea invisible" for Movistar +.

LinkedIn: www.linkedin.com/in/roberto-garcia-rodriguez-95980948/

LUCA MICHELI | Italy



Luca Micheli is Head of Sound at Chora Media, the leading Italian podcast production company. Luca Micheli is a radio director, sound designer and author, and composes theme songs and music for radio, TV and podcasts.

His works include, among others acclaimed podcast series, such as: "La Piena", "Veleno" for La Repubblica - Gruppo GEDI, "Buio", "Le guerre di Anna", "Cleopatra donna e regina" and "Oltre Il Confine" for Audible - Amazon.

LinkedIn:

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3. Sketching timelines of podcast movement and industry in the country

Europod: Could you set a beginning of the podcast movement in your country, mentioning 3 relevant milestones that depict the evolution of the podcast movement in your country?

Benjamin Hours (FR) : In France, it all started very early, with a program called *Dungeon of Naheulbeuk* back in 2001, which at the time was called “mp3 sagas”. It was fiction, but it was the beginning of the podcast somehow . In 2002, there was the launch of Arte Radio with “*Terrain d'eau*”, which at the beginning was not called podcasting either because the term did not exist. Around 2005-2006, there were already media interested in podcasting - meaning media other than radio -, like *Libération*, which made small audio-pills and also launched a longer program called “*Silence*” shortly afterwards. And then there was a big “*amateur wave*” in 2015-2016, which is really the beginning of the era in which we are still today somehow: the podcast era in France. Other milestones I'd mention are the arrival of Spotify in France, which started producing original podcasts in 2019.

Roberto García Rodríguez (ES): I believe the first milestone was the establishment of *iVoox*, back in 2005: the first podcast platform in Spain. Two other fundamental milestones, as I see through the past decade, were, in 2016, the establishment of Podium Podcast, which is a platform belonging to the PRISA group. This was a sign of the professionalisation of the podcast industry. Eventually, two important milestones occurred in 2021, which can be considered a single one somehow: the rebranding of iTunes as Apple Podcasts and the focus brought by Spotify on podcasting.

Luca Micheli (IT): The initial breakthrough was the decision by the national publisher GEDI to produce “*Veleno*” and Audible's decision to produce Matteo Caccia's “*La Piena*”. These events were followed by other forerunner productions. But at the level of market structuring, the entry of the media and podcast company Chora Media should be mentioned as a second milestone. And, finally, the consequent structural positioning of RAI Play Sound and GEDI (One Podcast) in the market.

Robert Abel (UK): Podcasting in the UK got going in the very early 2000s. I would say the first big milestone happened in 2004, when the BBC, who is massive in terms of audio in the UK, started publishing some of their talk radio shows on RSS podcasting. I would call out two podcasts: “*In Our Time*”, a Radio 4 show, and “*Kermode and Mayo's Film Review*”, which started as a podcast in 2005. I'd also talk about The Guardian. We started making podcasts around the same time as the BBC. For example, at the end of 2005, we put out the comedian Ricky Gervais' podcast, and it was a phenomenon. In 2006, we created “*Football Weekly*”, the football reporting podcast, and it's still one of

the biggest sports podcasts in the world. There were also two really influential independent podcasts that started around 2007: “*Answer Me This!*” by Helen Zaltzman and Olly Mann, and “*The Bugle*” by Andy Zaltzman and John Oliver. Then there was kind of a gap... Until 2014 and 2015, when independent producers started making podcasts on their own, rather than just getting commissions from the BBC or commercial radio. Then, another milestone would be the year 2018, which was a landmark year. What changed is that you could make enough money out of podcasting to put your own money into it, thanks to the tech development, the audience development, and the profile of podcasting development. 2018 was also the start of daily news podcasts in the UK. The BBC started with “*Beyond Today*”, and The Guardian followed literally a few days after with “*Today in Focus*”.

4. Mapping producers, key-productions, tools, awards & contests

Europod: Could you please list who, in your opinion, are the main five podcast producers – be they independent creators, or companies – in your country?

Benjamin Hours (FR): I'd mention Binge Audio. Then there's Slate France, who has the most listened-to native podcast in France: "*Transfert*". And after that, there's Studio Mini, which mainly does fiction stories. There's also Louie Media, who are very good at promoting their new productions. And then, probably the biggest in terms of volume of production, are the general culture information pamphlets. So, there is Bliss, particularly Bliss Stories, which often has very high figures, and is all about motherhood. I should also mention *Hugo Décrypte*, a Youtuber who has been present in the charts with replay-podcasts more recently.

Roberto García Rodríguez (ES): I'd say first and foremost, PRISA Audio, who is also the owner of Podium Podcast, SER podcast, As audio and El País audio. Most of the highest ranking shows on Spotify and Apple Podcast relate to PRISA Audio in one way or the other. Following, I'd mention El Extraordinario, which is a smaller production company, but makes products of a very high quality. Also, worth mentioning: Radio Primavera Sound, a production company which is also behind "*Deforme Semanal*" and True Story, which is the production company of Álvaro de Cózar, one of the best producers around. Last but not least, I should mention Sonora, the Atresmedia platform launched by Toni Garrido.

Luca Micheli (IT): Chora Media, One Podcast, Rai Play Sound, and the online media *ilPost*. I would also like to mention an independent producer: Jonathan Zenti.

Robert Abel (UK): In terms of bigger publishers or broadcasters, the BBC and Global are the first names that come to mind. In terms of news organisations, I would say The Guardian and The Economist are the leading ones. And then if you're talking about actual independent production companies, Somethin' Else – although it's actually now owned by Sony – Tortoise, Novel and Goalhanger.

Europod: Which are the 3 best productions in your countries in qualitative terms (post-prod) and why? Can you tell us how you assess the quality of a podcast production?

Benjamin Hours (FR): I'd mention first the podcast "*Mental FM*", by Arte Radio, which dates back to 2018. It's a project by Victoire Tuaillon, just before she did "*Les couilles sur la table*" and "*Le cœur sur table*" for Binge Audio. Then, I'd mention "*Les ex de François*" by Binge Audio and "*Les gens qui restent chez nous*" by Slate, which are more documentary-style. Also, there's "*À la recherche de l'attention*" by Majora Prod podcast, which won a prize for its music composition at the Paris Podcast Festival. Another I should mention is "*Hôtel Gorgias*" by Roman Facerias-Lacoste - it's fiction but it won Radio France's "Revelation Prize".

Roberto García Rodríguez (ES): So: "*Negra y Criminal*" by Cadena SER, "*El Gran Apagón*", "*Guerra Tres*" and "*La Esfera*" by Podium Podcast. Concerning how I assess the quality of a podcast, I believe that "less is more" is valid also in the field of podcasting, meaning: if there is something you can tell with sounds and not with words, just do it. Moreover, there is a term I often like to use which, translated in Spanish, would turn into "ear candies". Which means catching the listeners' attention. Nowadays, I think it is fundamental for a podcast that only relies on sound, to catch the listeners' attention, either through the quality of the sound or the quality of the voices, of the sound effects, of the production, or through the level of the post-production.

Luca Micheli (IT): "*La disciplina di Penelope*" by Chora Media and Rai Play Sound, "*Io ero il milanese*" by Rai Play Sound. My judgement is guided above all by the level of post-production and the care of the sound. But also the quality of the story itself and the writing.

Robert Abel (UK): In no particular order, "*My Dad Wrote A Porno*" is an obvious one because they did an extraordinarily successful thinking about different ways to monetize podcasts, "*Kermode and Mayo*" is the idea that the podcast is a shop window for a bigger community and it has a really passionate audience, "*The High Low*", it's more or a lifestyle arts show which is no longer published but it had an impact in widening the podcast audience, also "*The Rest Is Politics*". There are also The Guardian's shows, "*Today in Focus*" and "*Football Weekly*", which, like "*Kermode and Mayo*", has a huge passionate audience. In terms of investigative, true crime shows: "*Sweet Bobby*", which seemed to be quite successful in the US, "*The Missing Cryptoqueen*", "*Death in Ice Valley*", "*The Trojan Horse Affair*", it's an American produced project, but it's interesting that the topic is English. And then "*13 Minutes to the Moon*" was a big moment, it was a BBC show, it was really well made, good for high production values. And finally maybe "*You, Me and the Big C*" as well.

Europod: What are the nationally recognized podcast events (awards, industry meetings) happening in your country?

Benjamin Hours (FR): I would say the *Paris Podcast Festival*, which was established in 2018. There's also *Longueur d'onde*, which is more creative, a bit older but as important. And then there's one that I like, but it's a much smaller one: *PodRennes* – it's a festival of amateur podcasts which is ten years old. This year it's in its 10th edition.

Roberto García Rodríguez (ES): The *Ondas del Podcast* award, which is at its second edition. And *Estación Podcast*, which is the Iberoamerican Festival of Sound Creation.

Luca Micheli (IT): To me, the main ones are the *DIG Awards* – Podcast category and *ilPod* – *Italian Podcast Awards*, the latter being the first contest dedicated exclusively to podcasts. In this respect there is perhaps still room for growth. In addition, the Chora Academy should also be mentioned as the first level educational experience dedicated to the medium.

Robert Abel (UK): There were very well established events based around radio that already existed, and some of those have successfully pivoted towards podcasts. For example, Radio Academy organises the *Radio Academy Festival*, which 25 years ago was just about radio, and also the *ARIAS*, their big award ceremony. In terms of awards, there's the *British Podcast Awards*, and in terms of events, *the Podcast Show*, which started in London last year and was absolutely brilliant.

5. State of the development & future challenges

Europod: At what stage is your national market in your opinion?

Benjamin Hours (FR): We're really on the borderline between development and consolidation, but we've already almost completely switched to consolidation. At the end of 2022, we started to see small waves of takeovers and equity investments. There is still a little room for development, fortunately, but we are clearly starting the consolidation phase. The number of players is going to decrease a little, at least of major players.

Roberto García Rodríguez (ES): It's somewhere between being a hype or a boom, on the one hand, and a consolidated market, on the other one. This is not meant in a critical way. But the offer is growing much more than the demand. So many podcasts will disappear and some will consolidate.

Luca Micheli (IT): We are still in the development phase because the listening audience – although expanded – is rather small. There are still people who do not know what a podcast is. The quality of productions has increased considerably, but there are still loosely produced podcasts that enter the Spotify charts. The emergence

of podcast schools, such as Chora Media's Academy, are an important signal. Another signal indicating an intermediate stage of market development is also the limited variety of formats. There are still a few dramas, for example. Or a few productions with a kids target.

Robert Abel (UK): It's probably somewhere between development and consolidation. There still seems to be a lot of potential to grow the audience for podcasts, when I look at research or at our own numbers, they're continuing to go up. Then, if you think about the money, the period where massive international corporations are spending inflated prices on independent producers is slowing, and the cost of living crisis, the war on Ukraine, all that's having an effect on the ad market in the UK. In the short term, there will be an issue with making money out of ads and sponsorship. But generally, it's positive. In terms of the growth as a consumer medium, as a means at which to reach more people, that feels like it's just going to grow and grow.

Europod: What do you believe is the main and essential challenge the podcast movement in your country will face in the upcoming 5 years?

Benjamin Hours (FR): So, we are at a point where we risk having an industry that will be based on quantity, through an enormous amount of content in order to survive. But we may, on the other hand, get closer to what cinema is: notwithstanding a desire for volume, in the world of cinema, there is the primacy of quality that drives consumption. The challenge is not really to find the money because globally there are financial resources, but to understand under which conditions it will flow into the industry and, therefore, how it will also impact the quality of the production.

Roberto García Rodríguez (ES): I think the main challenge remains making the business profitable. This is linked to the issue of the "consolidation of the market". There are very big podcast projects in Spain today that are based on a whole lot of work behind the scenes, carried out by the blood, sweat and tears of the creators. But they still don't make a living out of this. In the end, if one can't make a living out of it, there comes a time when you go from doing a weekly podcast to doing a biweekly one, or doing it whenever you can. This is what the future of podcasting depends on. Also brands, as I was saying before, are investing more and more resources into podcasting because they see that by targeting a niche audience, they can segment their advertising campaigns more, instead of aiming at a wider audience, as happens in television, radio or press. So I think that that is the crux of the matter: making podcasting profitable.

Luca Micheli (IT): In my view, the challenge is to increase the proposal in terms of genres: both fiction and kids-targeted. That is, not to obsess over true crime, for example. And also to innovate in terms of format. From a post-production point of view, a turning point will also be production in Dolby Atmos. Finally, in the future, technological developments are also desirable. For the podcast audience to reach the numbers that radio does. In this sense, for example, it would be relevant to an

advancement in listening devices in cars to have the podcast at hand: today, whoever gets into the vehicle, turns on the radio and listens to whatever is streamed. Moreover, after all, the podcast became relevant as such only at the moment Apple created an application to use the medium.

Robert Abel (UK): Like I said, the immediate challenge is the ad market in the UK. What happened during the first COVID lockdowns gives me some feeling of optimism. In April and May 2020, the ad market for podcasts was absolutely disastrous, then by autumn, we were making extraordinary amounts of money. Part of the reason is that there was a moment where podcasting became incredibly popular during lockdown because people had little else to do. Also, there was uncertainty for brands and the ad market, and podcasting was very cheap, quick and effective. So now, our job is really to persuade agencies and brands to spend money on podcasting because it is cheap, quick and effective. Another challenge is also the future value, how do you create value in the future? And then I suppose the last opportunity or challenge is the USA or the anglophone audience in the world. We're lucky to share the same language with the biggest podcast audience and biggest advertising market in the world, America, and that's a huge opportunity.

6. CONCLUSION: bridging European podcast markets

This chapter has provided an overview of the development of four European podcast markets as seen through the eyes of high-level experts from the field of sound engineering, production and media. Interestingly, the answers to RePod's questionnaire highlight both similarities and divergences between the national markets.

The history of podcasting in the different countries can be traced through milestones that are related to specific investments by media companies (podcasts series), like in Italy. Also companies entering the market is understood as a key milestone. Eventually, in some cases, like in Spain, the start of the podcasting industry seems linked to the appearance of specific IT infrastructures, such as iVoxx.

Something that emerges from the interviews is that the UK emerges as the absolute reference in terms of podcasting and audio productions (see Annex). Further inquiring what makes the UK structurally such a powerful audio powerhouse, when compared to other European countries, could lead to relevant insights for the development of other European markets and podcast industries.

The interviews also provided crucial insights as to what are the challenges of the future for the industry. In these chapter conclusions we'd like to stress the importance of further technological developments in terms of how and where people can listen to podcasts (Luca Micheli's take on mobile-listening options), as well as, for

specific countries, the need for further diversification of genres and formats (Italy). However, the overarching question of the profitability of the industry and its sustainability appears paramount, as highlighted by Roberto Garcia Rodriguez. Yet, money is not a sufficient condition, if there is not a qualitative dimension to the investments, as underscored by Benjamin Hours.

We claim that bridging national podcast markets should be considered one of the most important avenues for the future. Most importantly to bring overall audiences of European podcasts closer to the US standards, at the same time safeguarding an open podcast ecosystem.

CHAPTER 3: CASE STUDY: THE SANTIAGO BOYS

1. The RePod-remake rationale

Besides the release of this industry report, the RePod project aimed at executing the remake/adaptation of an original podcast produced in one European language to another one. The podcast series that was the object of the remake operation is *The Santiago Boys*, produced by Chora Media and Post Utopia in 2023.



Europod claims that the multiplicity of languages on the European market represents a structural market failure limiting the audience of podcasters and creators – even when their stories could have an impact reaching far beyond the national border. In turn, this is putting a cap to the development of the advertisement market within the European podcast industry and, therefore, revenues of content creators. Compared to the video-sector, the podcast market lacks systematic approaches when it comes to fostering cross-border productions and remakes.

As mentioned in the introduction to this report, the latter is also due to the specificity of the podcast medium itself: intimate and language-bound. For the sake of comparison, videos can rely on the universal power of images and subtitles.

All in all, from a variety of perspectives (micro and macro), the European podcast market is in dire need of border-breaking audio production experiments⁵. In the next section we outline the companies that were involved in this remake / adaptation project, the process and timeline of the latter as well as some key challenges.

2. Involved companies and synopsis of the series

EUROPOD & CHORA MEDIA

Born in 2008, **Europod** is the first European network of podcasts in up to 8 languages. The mission of the Europod network is to “create a public sphere for producers of quality information from all European countries to share their stories and perspectives”. Until today, Europod has proved to be an interesting experiment allowing the emergence of original editorial podcast series. Multilingualism is at the heart of Europod. This led, in some cases, to the production of podcast series in more than one language. However, most of the productions focus on a specific European language.

Chora Media is an Italian storytelling company, founded in 2020. Chora Media caters to those in search of a richer perspective on the world, giving voice to a wide range of authentic narratives through an unconventional union of formats that start with podcasts and evolve into other forms (video, books, online and offline events).

The Santiago Boys is a podcast originally produced in English language by Chora Media and Post Utopia – a media company founded by Evgeny Morozov –, and released in 2023. The podcast tells the story of Cybersin, a project created by the Chilean President Salvador Allende in the ‘70s. Allende’s idea was to build a large digital network serving the at the time socialist government. It was a sort of internet before the internet, that would have made centralization possible, allowing to process an enormous amount of data from all over Chile. However, the project was abruptly interrupted due to the 1973 coup which brought General Pinochet to power. The podcast series tries to answer the question of what would have happened if Allende had completed his project? And it delves deeply into the research done by the engineers (the Santiago Boys) who helped the Chilean president and, in particular, into the figure of a prominent British technology guru, Stafford Beer.

Europod and Chora Media identified *The Santiago Boys* as a best match for an adaptation into French, due to:

⁵ Notably, the WePod project (www.wepodproject.eu) is trying to change this dynamic. The project foresees the co-production and remake into different languages of originally produced journalistic reportage podcast series.

- A very recognisable and cross-border known host and author: Evgeny Morozov.
- The European (if not global) dimension of the story.
- The narrative structure of the podcast.

3. Legal agreements, timeline and production process

SCOPE OF AGREEMENTS BETWEEN COMPANIES AND PROJECT TIMELINE

Europod and Chora Media kicked off legal and contractual negotiations as of late 2023. As a final result, Chora Media granted Europod a five-year licence for the production and distribution of the French-language remake. The licence was granted free of charge by Chora Media, in exchange for a percentage of the incomes generated. The agreement was formalised by employing a licensing contract.

DECEMBER 2023

- **Preparatory editorial work:** translation from English to French, based on the original scripts provided by Chora, began in **December 2023**, with the support of *Éditions Divergence*.

FEBRUARY 2024

- **Signature of legal and commercial agreement** between Chora Media and Europod.
- **Acquisition of music-theme related rights** from third-party services, by Europod.

MARCH 2024

- **Production of advanced editorial documents** (adaptations for audio from literary translation by Edition Divergence, to facilitate the recording of the narration and the dubbing of the podcast's many speakers.
- **REC** of narration and dubbing.
- **Post-production.**
- **Release of the first episode** of the series.

APRIL – MAY – JUNE 2024

- **Weekly release** of the podcast episodes.

- **Promotional live events in Brussels and Paris**, with the author of the original scripts, Euvgeny Morozov.

JULY 2024

- **Release of the last episode** of the series.

BEHIND THE SCENES: TRANSLATION, ADAPTATION, CASTING OF VOICES AND USE OF AI

The original podcast script in English language was translated into French by the French publishing company, *Éditions Divergence*. In fact, the latter curated the release of a book of the story. Therefore, the first draft script in French came as composed into book chapters. Each book chapter corresponded to an episode of the original version. However, Europod took the decision to cut each episode down into two shorter episodes. Therefore the remake became an 18 episode long series, instead of 9. The length of each new episode would range from 18 to a maximum of 30 minutes. On top, the translation was re-edited for audio-listening purposes. In fact, the French translation of the original episodes went through a partial rewriting phase to make it more apt for reading. This process implied significant differences in terms of style between the original version and the translated text.

Next Europod took care of identifying the whole list of voices-characters appearing in the podcast: not only real interviewees, but also characters speaking through memos, telexes, messages in newspapers. Voices for each character were selected. A spreadsheet featuring colour codes and pictograms was developed to keep track of the advancement of the casting and the upcoming recording of voices. For each episode, Europod's staff produced a "cascade of dubbing documents", related to each character appearing in the episode. Each casted voice/dubber received a brief through which it was possible to quickly access the part that corresponded to that extract in the original version. So dubbers could get used to the idea of the rhythm and duration of the original version. A tutorial was also prepared for dubbers. Europod collected audio files and created a repository, per episode, of the different takes to facilitate the post-production process. The post-production process was streamlined based on the transfer of the original STEMS composing each episode (narration, fx, music, etc.).

On top of the latter processes, Europod used AI-tool Eleven Labs and, more specifically, voice cloning, to lower the production cost of the remake. So much so that from episode 4 onwards, a third of the voices were done through this technology. Through Eleven Labs, Europod trained a voice cloning model, based on the original takes. Oftentimes, files created by the software need a re-work on audio editing platforms. All dubbers involved gave consent to the voice cloning activity. On top,

Eleven Labs provides the option for not storing original voice recordings. No original take recorded by Europod was stored on Eleven Labs servers for third-party use.

4. Conclusions and the elephant in the room

This RePod report served a two main objectives:

- Providing a qualitative cross-country analysis of European podcast markets.
- Describing the process behind a European cross-border podcast remake.

National media and production companies can use the qualitative information in chapter 2 and 3 to better understand what type of content could have better chances of success in different European countries. Likewise, they can take inspiration from the remake of *The Santiago Boys* to run their own remake operations.

Meanwhile, in these conclusions we would like to stress a few outcomes of the whole RePod project.

First of all, it appears that European podcast markets differ a lot in terms of the “phase of development” they are currently living through, with the UK clearly leading the way. Arguably, this is also related to the international dimension of the English language (although also French and Spanish are widely spoken languages). But more than that, it is interesting to notice how the BBC appears to have played an important role in developing a whole range of production companies along the past decades. Consequently, the experts interviewed for this report also stressed different priorities for their national markets to growth, ranging from technological development in the way audiences can interact with podcasts to format-development, passing through sustainability concerns at large.

Secondly, based on the experimental remake of *The Santiago Boys* into French, AI appears clearly as the technology potentially bridging different national productions. Along the RePod project, this topic has been extensively researched and discussed on the project homonymous podcast series and, more specifically, in the second season of the latter *RePod - AI and the future of podcasting*⁶. The conversations run in the different podcast episodes of the series point at a potential positive impact of AI on production processes, the growth of the advertising industry, and marketing. For further information on this matter we invite the readers of this report to listen to the podcast series, *wherever they listen to podcasts*.

⁶ The feed of RePod - European podcasting, hosted on Acast: <https://shows.acast.com/repod>

CREDITS

The authors of this report are **Alexander Damiano Ricci** - COO at Europod -, **Cécile Rondeau Arnaud** - Associate Partner Manager at Acast France - and **Antoine Lheureux** - CEO of Europod.

Interviews with national experts were run by **Alexander Damiano Ricci** (Luca Micheli, Chora Media and Robert Abel, The Guardian), **Silvia Serrano** (Roberto García, Cadena SER) and **Antoine Lheureux** (Benjamin Hours, Slate FR).

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Special thanks to **Guillaume Genest** for sharing the insights about the process behind the remake of *The Santiago Boys* into French.

Graphic design by **Constance Hautier** and **Nikita Rathod** (Europod).

ANNEX – Complete Transcripts of Expert Interviews

Annex 1: RePod

Bridging European podcast markets

INTRODUCTION

- France | Benjamin Hours (BH) – (Former) Head of podcasts at Slate FR
- LinkedIn: <https://www.linkedin.com/in/benjamin-hours-49791317/>

Benjamin Hours served as Head of podcast at **Slate (France)** between November 2018 and February 2023. Slate is one of the leading podcast producers in France, featuring top-listened shows on Spotify, Apple Podcast and Deezer. Slate notably produces the most listened podcast in France (Transfert) Slate.

At Slate, Benjamin Hours was responsible for the **selection** and validation of **podcasts at all stages of their creation**, from their conceptualisation to their online publication. Benjamin Hours has been behind the production of hundreds of episodes for more than twenty different podcasts (talk shows, documentaries, interviews). His duties included also coaching and supervision of podcasters and producers, the general art direction and narrative direction of the Slate FR's podcasts, as well as the management of relations with platforms (Apple Podcasts, Spotify, Amazon Music, etc.) and partners (ACPM, Audion, Audiomeans, etc.).

SKETCHING TIMELINES OF PODCAST MOVEMENT AND INDUSTRY IN THE COUNTRY

Europod: Could you set a beginning of the podcast movement in your country, mentioning 3 relevant milestones that depict

the evolution of the podcast movement in your country?

Benjamin Hours (FR): In France, it all started very early, with a program called *Dungeon of Naheulbeuk* back in 2001, which at the time was called “mp3 sagas”. It was fiction, but it was the beginning of the podcast somehow. In 2002, there was the launch of Arte Radio with “Terrain d'eau”, which at the beginning was not called podcasting either because the term did not exist. Around 2005-2006, there were already media interested in podcasting – meaning media other than radio –, like *Libération*, which made small audio-pills and also launched a longer program called “Silence” shortly afterwards. And then there was a big “amateur wave” in 2015-2016, which is really the beginning of the era in which we are still today somehow: the podcast era in France. In 2016-2017 started the professionalisation of podcasts in France with shows like Transfert. Other milestones I'd mention are the arrival of Spotify in France, which started producing original podcasts in 2019.

MAPPING PRODUCERS, KEY-PRODUCTIONS, TOOLS, AWARDS & CONTESTS

Europod: Could you please list who, in your opinion, are the main five podcast producers – be they independent creators, or companies – in your country?

Benjamin Hours (FR): I'd mention Binge Audio. Then there's Slate France, who has the most listened-to native podcast in France: “Transfert”. And after that, there's Studio Minuit, which mainly does fiction stories. There's also Louie Media, who are very good at

promoting their new productions. And then, probably the biggest in terms of volume of production, are the general culture information pamphlets. So, there is Bliss, particularly Bliss Stories, which often has very high figures, and is all about motherhood. I should also mention *Hugo Décrypte*, a Youtuber who has been present in the charts with replay-podcasts more recently.

Europod: Which are the 3 best productions in your countries in qualitative terms (post-prod) and why? Can you tell us how you assess the quality of a podcast production?

Benjamin Hours (FR): I'd mention first the podcast "Mental FM", by Arte Radio, which dates back to 2018. It's a project by Victoire Tuaillon, just before she did "Les couilles sur la table", "Le cœur sur table" for Binge Audio. Then, I'd mention "Les ex de François" by Binge Audio and "Les gens qui restent" by Slate France, which are more documentary-style. Also, there's "À la recherche de l'attention" by Majora Prod podcast, which won a prize for its music composition at the Paris Podcast Festival. Another I should mention is "Hôtel Gorgias" by Roman Facerias-Lacoste - it's fiction but it won Radio France's "Revelation Prize".

Europod: What are the nationally recognized podcast events (awards, industry meetings) happening in your country?

Benjamin Hours (FR): I would say the Paris Podcast Festival, which was established in 2018. There's also *Longueur d'onde*, which is more creative, a bit older but as important. And then there's one that I like, but it's a much smaller one: *PodRennes* - it's a festival of amateur podcasts which is ten years old. This year it's in its 10th edition.

STATE OF THE DEVELOPMENT & FUTURE CHALLENGES

Europod: At what stage is your national market in your opinion?

Benjamin Hours (FR): We're really on the borderline between development and consolidation, but we've already almost completely switched to consolidation. At the end of 2022, we started to see small waves of takeovers and equity investments. There was still a little room for development, fortunately, but we are clearly starting the consolidation phase. Recently, there were big changes with Paradiso Media buying Binge Audio then declaring bankruptcy a year later.

Europod: What do you believe is the main and essential challenge the podcast movement in your country will face in the upcoming 5 years?

Benjamin Hours (FR): So, we are at a point where we risk having an industry that will be based on quantity, through an enormous amount of content in order to survive. But we may, on the other hand, get closer to what cinema is: notwithstanding a desire for volume, in the world of cinema, there is the primacy of quality that drives consumption. The challenge is not really to find the money because globally there are financial resources, but to understand under which conditions it will flow into the industry and, therefore, how it will also impact the quality of the production.

ORIGINS AND EVOLUTION OF THE PODCAST MOVEMENT

Europod: Which can be considered two milestones in terms of production in your country, and why?

Benjamin Hours (FR): It's hard to specify production milestones because the

improvements are, at a given time, always a bit over the place. I think there has been a clear improvement over time.

WHO'S WHO: PRODUCERS, EVENTS AND PRODUCTION EXAMPLES

Europod: Which are the most used editing tools in terms of editing and project management in your country?

Benjamin Hours (BH) - FR: *Reaper, Pro Tools, Logic, Audacity, Zencastr and Facetime* audio.

EUROPEAN PERSPECTIVE

Europod: Could you try to sketch what you believe is the main specificity of your country in terms of podcast production, from a European comparative perspective - for instance, genres, formats, other details?

Benjamin Hours (BH) - FR: I have the impression that, more than elsewhere, in France, because podcasting was born among amateurs, the commitment of podcasters for a given theme-topic is very strong. It almost leads to a sort of embodiment of the theme with the podcasters. Also, a typical French format is the one of an open chat, where one would put a microphone in front of a group of friends, sitting around a table. And, by the way, that still works today, but much more among amateurs. Last but not least, I think that, in France, people are very attached to the documentary format. So: documentary, commitment and embodiment with the theme: these would be the three key characteristics of the French podcasting world.

Europod: Is there a specific country in the EU that you consider a reference in terms of podcast production, and why? What is your country lacking to reach that level?

Benjamin Hours (FR): In terms of the maturity of the market, I think that the only country which is a little bit ahead is the UK. But I think that in continental Europe France is probably the first industry with a large margin over the other markets.

Annex 2: RePod

Bridging European podcast markets

INTRODUCTION

- UK | **Robert Abel** (RA) – Head of Audio Business and Strategy at The Guardian
- LinkedIn:
<https://uk.linkedin.com/in/robert-abel-15ba0317a>

Robert Abel is the **Head of Audio Business and Strategy** at **The Guardian**, the news publisher in the UK, since 2019. His role is to think about the future of audio and podcasting, and to create business plans to allow it to happen.

Before The Guardian, Robert Abel was **Head of Audio** at **Somethin' Else** from 2000 to 2019. Somethin' Else was the biggest independent audio production company in the UK in the 2010s. He had an editorial role, in charge of all of the audio production which consisted of BBC commissions, commercial radio commissions and podcasts.

SKETCHING TIMELINES OF PODCAST MOVEMENT AND INDUSTRY IN THE COUNTRY

Europod: Could you set a beginning of the podcast movement in your country, mentioning 3 relevant milestones that depict the evolution of the podcast movement in your country?

Robert Abel (UK): Podcasting in the UK got going in the very early 2000s. I would say the first big milestone happened in 2004, when the BBC, which is massive in terms of audio in the UK, started publishing some of their talk radio shows on RSS podcasting. I would call out two podcasts: “*In Our Time*”, a Radio 4 show, and “*Kermode and Mayo's Film Review*”, which started as a podcast in 2005. I'd also

talk about The Guardian. We started making podcasts around the same time as the BBC, for example, at the end of 2005, we put out the comedian Ricky Gervais' podcast, and it was a phenomenon. Shortly afterwards, it was featured in the Guinness Book of Records as the most downloaded podcast of all time. In 2006, we created “*Football Weekly*”, the football reporting podcast, and it's still one of the biggest sports podcasts in the world. There were also two really influential independent podcasts that started around 2007: “*Answer Me This!*” by Helen Zaltzman and Olly Mann, and “*The Bugle*” by Andy Zaltzman and John Oliver. Then you could jump to 2018, which was a landmark year. What changed is that businesses could make enough money via podcasting advertising to put their own money into it, thanks tech development in podcast advertising, the growth in the UK podcast audience, and the development of the podcast advertising market. 2018 was also the start of daily news podcasts in the UK. The BBC started with “*Beyond Today*”, and The Guardian followed literally a few days after with “*Today in Focus*”.

MAPPING PRODUCERS, KEY-PRODUCTIONS, TOOLS, AWARDS & CONTESTS

Europod: Could you please list who, in your opinion, are the main five podcast producers – be they independent creators, or companies – in your country?

Robert Abel (UK): In terms of bigger publishers or broadcasters, the BBC and Global are the first names that come to mind. In terms of legacy news organisations, I would say The Guardian and The Economist are the leading ones. And then if you're talking about actual independent production companies, Somethin' Else – although it's actually now owned by Sony – Tortoise, and Goalhanger.

Europod: Which are the 3 best productions in

your countries in qualitative terms (post-prod) and why? Can you tell us how you assess the quality of a podcast production?

Robert Abel (UK): In no particular order, “*My Dad Wrote A Porno*” is an obvious one because they were extraordinarily successful in creating a huge brand around a podcast and then making brand extensions, like their live tours, a huge success as well, “*Kermode and Mayo*” has been using social media for many years to keep its huge and very passionate audience engaged between podcast episodes. They’ve leveraged that really positive relationship with their community to create subscription only bonus episodes. , “*The High Low*”, it’s more or a lifestyle arts show which is no longer published but it had a big impact in widening the podcast audience, also “*The Rest Is Politics*”. There are also The Guardian’s shows, “*Today in Focus*” and “*Football Weekly*”, which, like “*Kermode and Mayo*”, has a huge passionate audience. In terms of investigative, true crime shows: “*Sweet Bobby*”, which seemed to be quite successful in the US, “*The Missing Cryptoqueen*”, “*Death in Ice Valley*”, “*The Trojan Horse Affair*”, it’s an American produced project, but it’s interesting that the topic is English. And then “*13 Minutes to the Moon*” was a big moment. It was a BBC show, it was really well made, with very production values. And finally maybe “*You, Me and the Big C*” as well.

Europod: What are the nationally recognized podcast events (awards, industry meetings) happening in your country?

Robert Abel (UK): There were very well established events based around radio that already existed, and some of those have successfully pivoted towards podcasts. For example, Radio Academy organises the *Radio Academy Festival*, which 25 years ago was just about radio, and also the *ARIAS*, their big award ceremony. In terms of awards, there’s the *British Podcast Awards*, and in terms of events, the *Podcast Show*, which started in

London a few years ago and was absolutely brilliant.

STATE OF THE DEVELOPMENT & FUTURE CHALLENGES

Europod: At what stage is your national market (beginnings, development, consolidation) in your opinion?

Robert Abel (UK): It’s probably somewhere between development and consolidation. There still seems to be a lot of potential to grow the audience for podcasts. For example, when I look at our own numbers, they’re continuing to go up. Then, if you think about the money, the period where massive international corporations are spending inflated prices on independent producers is slowing, and the cost of living crisis, the war on Ukraine, all that’s having an effect on the ad market in the UK. In the short term, there will be an issue with making money out of ads and sponsorship. But generally, it’s positive. In terms of the growth as a consumer medium, as a means at which to reach more people, that feels like it’s just going to grow and grow.

Europod: What do you believe is the main and essential challenge the podcast movement in your country will face in the upcoming 5 years?

Robert Abel (UK): Like I said, the immediate challenge is the ad market in the UK. What happened during the first COVID lockdowns gives me some feeling of optimism, in April and May 2020, the ad market for podcasts was absolutely disastrous, then by autumn, we were making extraordinary amounts of money. Part of the reason is that there was a moment where podcasting became incredibly popular during lockdown because people had little else to do. Also, there was uncertainty for brands and the ad market, and podcasting was very cheap, quick and effective. So now, our

job is really to persuade agencies and brands to spend money on podcasting because it is cheap, quick and effective. Another challenge is also the future value, how do you create value in the future? And then I suppose the last opportunity or challenge is the USA or the anglophone audience in the world. We're lucky to share the same language with the biggest podcast audience and biggest advertising market in the world, America, and that's a huge opportunity.

ORIGINS AND EVOLUTION OF THE PODCAST MOVEMENT

Europod: Could you set a beginning of the podcast movement in your country, mentioning 3 relevant milestones that depict the evolution of the podcast movement in your country?

Robert Abel (RA) - UK: Podcasting in the UK got going in the very early 2000s. I would say the first big milestone happened in 2004, when the BBC, who is massive in terms of audio in the UK, started publishing some of their talk radio shows on RSS podcasting. I would call out two podcasts: "*In Our Time*", a Radio 4 show, and "*Kermode and Mayo's Film Review*", which started as a podcast in 2005. I'd also talk about The Guardian, we started making podcasts around the same time as the BBC, for example, at the end of 2005, we put out the comedian Ricky Gervais' podcast, and it was a phenomenon. In 2006, we created "*Football Weekly*", the football reporting podcast, and it's still one of the biggest sports podcasts in the world. There were also two really influential independent podcasts that started around 2007: "*Answer Me This!*" by Helen Zaltzman and Olly Mann, and "*The Bugle*" by Andy Zaltzman and John Oliver. Then there was kind of a gap, until 2014, 2015, when independent producers started making podcasts on their own, rather than just getting commissions from the BBC or commercial radio. Then, another milestone

would be the year 2018, which was a landmark year. What changed is that you could make enough money out of podcasting to put your own money into it, thanks to the tech development, the audience development, and the profile of podcasting development. 2018 was also the start of daily news podcast in the UK. The BBC started with "*Beyond Today*", and The Guardian followed literally a few days after with "*Today in Focus*".

Europod: At what stage is your national market (beginnings, development, consolidation) in your opinion?

Robert Abel (RA) - UK: It's probably somewhere between development and consolidation. There still seems to be a lot of potential to grow the audience for podcasts, when I look at research or at our own numbers, they're continuing to go up. Then, if you think about the money, the period where massive international corporations are spending inflated prices on independent producers is slowing, and the cost of living crisis, the war on Ukraine, all that's having an effect on the ad market in the UK. In the short term, there will be an issue with making money out of ads and sponsorship. But generally, it's positive. In terms of the growth as a consumer medium, as a means at which to reach more people, that feels like it's just going to grow and grow.

Europod: Production milestones: which can be considered two milestones in terms of production in your country, and why?

Robert Abel (RA) - UK: "*13 Minutes to the Moon*" was a big moment. I'm an audio producer at heart, I love things that are produced really well. "*13 Minutes to the Moon*" was produced by the BBC, and it was really well made, good for high production values, it's just a real pleasure to listen to. It has really great music produced especially for it, incredible sound design, really great editing, the whole package. And then "*Have You Heard George's Podcast?*" by George the Poet, I would say up to hearing that podcast, I hadn't really

heard anything in podcasting that I hadn't already heard in radio. And I think that was an advance in terms of editorial approach and sound design.

Europod: Future challenges: what do you believe is the main and essential challenge the podcast movement in your country will face in the upcoming 5 years?

Robert Abel (RA) - UK: Like I said, the immediate challenge is the ad market in the UK. What happened during the first COVID lockdowns gives me some feeling of optimism, in April and May 2020, the ad market for podcast was absolutely disastrous, then by autumn, we were making extraordinary amounts of money. Part of the reason is that there was a moment where podcasting became incredibly popular during lockdown because people had little else to do. Also, there was uncertainty for brands and the ad market, and podcasting was very cheap, quick and effective. So now, our job is really to persuade agencies and brands to spend money on podcasting because it is cheap, quick and effective. Another challenge is also the future value, how do you create value in the future? And then I suppose the last opportunity or challenge is the USA or the anglophone audience in the world. We're lucky to share the same language with the biggest podcast audience and biggest advertising market in the world, America, and that's a huge opportunity.

WHO'S WHO: PRODUCERS, EVENTS AND PRODUCTION EXAMPLES

Europod: Could you please list who, in your opinion, are the main five podcast producers – be they independent creators, or companies – in your country?

Robert Abel (RA) - UK: In terms of bigger publishers or broadcasters, the BBC and Global

are the first names that come to mind. In terms of news organisations, I would say The Guardian and The Economist are the leading ones. And then if you're talking about actual independent production companies, Somethin' Else – although it's actually now owned by Sony – Tortoise, Novel and Goalhanger.

Europod: Which are the 3 best productions in your countries in qualitative terms (post-prod) and why? Can you tell us how you assess the quality of a podcast production?

Robert Abel (RA) - UK: In no particular order, "My Dad Wrote A Porno" is an obvious one because they did an extraordinarily successful thinking about different ways to monetize podcasts, "Kermode and Mayo" is the idea that the podcast is a shop window for a bigger community and it has a really passionate audience, "The High Low", it's more or a lifestyle arts show which is no longer published but it had an impact in widening the podcast audience, also "The Rest Is Politics". There are also The Guardian's shows, "Today in Focus" and "Football Weekly", which, like "Kermode and Mayo", has a huge passionate audience. In terms of investigative, true crime shows: "Sweet Bobby", which seemed to be quite successful in the US, "The Missing Cryptoqueen", "Death in Ice Valley", "The Trojan Horse Affair", it's an American produced project, but it's interesting that the topic is English. And then "13 Minutes to the Moon" was a big moment, it was a BBC show, it was really well made, good for high production values. And finally maybe "You, Me and the Big C" as well.

Europod: What are the nationally recognized podcast events (awards, industry meetings) happening in your country?

Robert Abel (RA) - UK: There were very well established events based around radio that already existed, and some of those have successfully pivoted towards podcasts. For example, Radio Academy organises the *Radio Academy Festival*, which 25 years ago was just about radio, and also the *ARIAS*, their big award ceremony. In terms of awards, there's the *British Podcast Awards*, and in terms of events, *the Podcast Show*, which started in London last year and was absolutely brilliant.

EUROPEAN PERSPECTIVE

Europod: Could you try to sketch what you believe is the main specificity of your country in terms of podcast production, from a European comparative perspective - for instance, genres, formats, other details?

Robert Abel (RA) - UK: I think maybe what is exciting about the UK is that, again, I talked previously about the fact that there's this huge well of talent in the UK because of BBC outsourcing over 30 years, and that touches pretty much any discipline of audio. So, for example, in America, years ago, they used to do full cast audio dramas on American radio. It's not a thing in America anymore, it is still a thing in the UK. So there are lots of fantastic directors, producers, independent production companies that make full cast dramas, with sound design recorded on location, the highest quality audio drama possible in English. And there are also people who are fantastic at making sports audio or lifestyle audio. There's a huge well of talent in the UK and I think the exciting thing is that the audience doesn't want one single thing, they want different things. And we have the talent there to be able to deliver pretty much any type of format or media in audio. The challenge, as ever, with podcasting is distribution and marketing, getting the right podcast to the right audience and getting it in front of them so that they know it exists.

Europod: Is there a specific country in the EU that you consider a reference in terms of podcast production, and why? What is your country lacking to reach that level?

Robert Abel (RA) - UK: We are primarily interested in the audiences, so we look with interest at how developed podcasting is as a consumer habit in different countries. In that sense, Western Europe is the obvious answer to those. France, Germany, Spain. Italy, perhaps? I was also thinking about the Nordic countries in terms of innovation, the sort of technical side of things. There seems to be innovation, in the past and now, coming out of the Nordic countries in terms of what's possible behind the scenes

Annex 3: RePod

Bridging European podcast markets

INTRODUCTION

- Spain | Roberto García Rodríguez (RGR) - Head of productions at SER Podcast
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Roberto García Rodríguez is **Head of productions** at SER Podcast, the podcast platform of **Cadena SER**. Roberto García is in charge of the implementation of projects, the **production** of content and the **development** and **maintenance** of the SER Podcast platform.

Producer and **sound designer** in podcasts such as: "Agur ETA", "Clara Conquista", "El puzle Voynich", "Cómo no te voy a querer", "Chapapote: la mancha del Prestige", "Sastre y maldonado", or "Leo, el argentino" for SER Podcast. "Negra y Criminal", "Menlo Park", "Inés y lo huevos mágicos" or "Aventuras en la

Bañera" for Podium Podcast. "La Linea invisible" for Movistar +.

SKETCHING TIMELINES OF PODCAST MOVEMENT AND INDUSTRY IN THE COUNTRY

Roberto García Rodríguez (RGR) - ES: I believe the first milestone was the establishment of iVoox, back in 2005: the first podcast platform in Spain. Two other fundamental milestones, as I see through the past decade, were, in 2016, the establishment of Podium Podcast, which is a platform belonging to the PRISA group. This was a sign of the professionalisation of the podcast industry. Eventually, two important milestones occurred in 2021, which can be considered a single one somehow: the rebranding of iTunes as Apple Podcasts and the focus brought by Spotify on podcasting.

MAPPING PRODUCERS, KEY-PRODUCTIONS, TOOLS, AWARDS & CONTESTS

Europod: Could you please list who, in your opinion, are the main 5 podcast producers – be they independent creators, or companies – in your country?

Roberto García Rodríguez (RGR) - ES: I'd say first and foremost, PRISA Audio, who is also the owner of Podium podcast, SER podcast, As audio and El País audio. Most of the highest ranking shows on Spotify and Apple Podcast relate to PRISA Audio in one way or the other. Following, I'd mention El Extraordinario, which is a smaller production company, but makes products of a very high quality. Also, worth mentioning: Radio Primavera Sound and True Story, which is the production company of Álvaro de Cózar, one of the best producers around.

Europod: Which are the 3 best productions in your countries in qualitative terms (post-prod) and why? Can you tell us how you assess the quality of a podcast production?

Roberto García Rodríguez (RGR) - ES: "Negra y Criminal" by Cadena SER, "El Gran Apagón", "Guerra 3" and "La Esfera" by Podium Podcast. Concerning how I assess the quality of a podcast, I believe that "less is more" is valid also in the field of podcasting, meaning: if there is something you can tell with sounds and not with words, just do it. Moreover, there is a term I often like to use which, translated in Spanish, would turn into "ear candies". Which means catching the listeners' attention. Nowadays, I think it is fundamental for a podcast that only relies on sound, to catch the listeners' attention, either through the quality of the sound or the quality of the voices, of the sound effects, of the production, or through the level of the post-production.

Europod: What are the nationally recognized podcast events (awards, industry meetings) happening in your country?

Roberto García Rodríguez (RGR) - ES: The *Ondas del Podcast* award, which is at its third edition. And *Estación Podcast*, which is the Iberoamerican Festival of Sound Creation.

STATE OF THE DEVELOPMENT & FUTURE CHALLENGES

Europod: At what stage is your national market(beginnings,development, consolidation) in your opinion?

Roberto García Rodríguez (RGR) - ES: It's somewhere between being a hype or a boom, on the one hand, and a consolidated market, on the other one. This is not meant in a critical way. But the offer is growing much more than the demand. So many podcasts will disappear and some will consolidate.

Europod: What do you believe is the main and essential challenge the podcast movement in your country will face in the upcoming 5 years?

Roberto García Rodríguez (RGR) - ES: I think the main challenge remains making the business profitable. This is linked to the issue of the "consolidation of the market". There are very big podcast projects in Spain today that are based on a whole lot of work behind the scenes, carried out by the blood, sweat and tears of the creators. But they still don't make a living out of this. In the end, if one can't make a living out of it, there comes a time when you go from doing a weekly podcast to doing a biweekly one, or doing it whenever you can. This is what the future of podcasting depends on. Also brands, as I was saying before, are investing more and more resources into podcasting because they see that by targeting a niche audience, they can segment their advertising campaigns more, instead of aiming at a wider audience, as happens in television, radio or press. So I think that that is the crux of the matter: making podcasting profitable.

ORIGINS AND EVOLUTION OF THE PODCAST MOVEMENT

Europod: : Could you set a beginning of the podcast movement in your country, mentioning 3 relevant milestones that depict the evolution of the podcast movement in your country?

Roberto García Rodríguez (RGR) - ES: I believe the first milestone was the establishment of iVoox, back in 2005: the first podcast platform in Spain. Two other fundamental milestones, as I see through the past decade, were, in 2016, the establishment of Podium Podcast, which is a platform belonging to the PRISA group. This was a sign of the professionalisation of the podcast industry. Eventually, two important

milestones occurred in 2021, which can be considered a single one somehow: the rebranding of iTunes as Apple Podcasts and the focus brought by Spotify on podcasting.

Europod: Which can be considered two milestones in terms of production in your country, and why?

Roberto García Rodríguez (RGR) - ES: I'd mention "*El Gran Apagón*" by Podium Podcast and "*Vida Moderna*" by SER Podcasts. "*El Gran Apagón*" is the first big Spanish production that, on top of its podcast success, has also reached television in 2022, through Movistar. Which translated into reaching a large audience. The show went viral, so to speak, at a 5 years distance from the end of its first podcast season. "*El Gran Apagón*" was one of the first high quality sound fiction series in anycase. "*La Vida Moderna*", instead, was a television program which, as such, was not very successful. Instead, as a video podcast and podcast – by the way, it was one of the first video podcasts – it achieved something remarkable since the days of José Ramón de la Morena's "*El Larguero*" (SER Podcast), namely: bringing people back to radio, and young people more specifically. So "*La Vida Moderna*" is a radio-format which obtained success thanks to the podcast on-demand logic. For these reasons, it's a relevant milestone. After this case, or more or less at the same time, came "*Nadie Sabe Nada*" by SER Podcast and then "*Estirando el chicle*" by Podium Podcast.

WHO'S WHO: PRODUCERS, EVENTS AND PRODUCTION EXAMPLES

Europod: Could you please list who, in your opinion, are the main five podcast producers – be they independent creators, or companies – in your country?

Roberto García Rodríguez (RGR) - ES: I'd say first and foremost, PRISA Audio, who is also

the owner of Podium podcast, SER podcast, As audio and El País audio. Most of the highest ranking shows on Spotify and Apple Podcast relate to PRISA Audio in one way or the other. Following, I'd mention El Extraordinario, which is a smaller production company, but makes products of a very high quality. Also, worth mentioning: Radio Primavera Sound, a production company which is also behind "Deforme Semanal" and True Story, which is the production company of Álvaro de Cózar, one of the best producers around. Last but not least, I should mention Sonora, the Atresmedia platform launched by Toni Garrido.

Europod: Which are the 3 best productions in your countries in qualitative terms (post-prod) and why? Can you tell us how you assess the quality of a podcast production?

Roberto García Rodríguez (RGR) - ES: So: "Negra y Criminal" by Cadena SER, "El Gran Apagón", "Guerra Tres" and "La Esfera" by Podium Podcast. Concerning how I assess the quality of a podcast, I believe that "less is more" is valid also in the field of podcasting, meaning: if there is something you can tell with sounds and not with words, just do it. Moreover, there is a term I often like to use which, translated in Spanish, would turn into "ear candies". Which means catching the listeners' attention. Nowadays, I think it is fundamental for a podcast that only relies on sound, to catch the listeners' attention, either through the quality of the sound or the quality of the voices, of the sound effects, of the production, or through the level of the post-production.

Europod: What are the nationally recognized podcast events (awards, industry meetings) happening in your country?

Roberto García Rodríguez (RGR) - ES: The *Ondas del Podcast* award, which is at its second edition. And *Estación Podcast*, which is the Iberoamerican Festival of Sound Creation.

Annex 4: RePod

Bridging European podcast markets

INTRODUCTION

- Italy | Luca Micheli (LM) - xxx
- Linkedin: xxx

"We need greater diversification in genres and formats"

ORIGINS AND EVOLUTION OF THE PODCAST MOVEMENT

EUROPOD: Could you set a beginning of the podcast movement in your country, mentioning 3 relevant milestones that depict the evolution of the podcast movement in your country?

Luca Micheli (LM) - IT: The initial breakthrough was the decision by the national publisher GEDI to produce "Veleno" and Audible's decision to produce Matteo Caccia's "La Piena". These events were followed by other forerunner productions. But at the level of market structuring, the entry of the media and podcast company Chora Media should be mentioned as a second milestone. And, finally, the consequent structural positioning of RAI Play Sound and GEDI (One Podcast) in the market.

EUROPOD: At what stage is your national market (beginnings, development, consolidation) in your opinion?

Luca Micheli (LM) - IT: We are still in the development phase because the listening audience - although expanded - is rather small. There are still people who do not know what a podcast is. The quality of productions has increased considerably, but there are still loosely produced podcasts that enter the

Spotify charts. The emergence of podcast schools, such as Chora Media's Academy, are an important signal. Another signal indicating an intermediate stage of market development is also the limited variety of formats. There are still a few dramas, for example. Or a few productions with a kids target.

EUROPOD: Production milestones: which can be considered two milestones in terms of production in your country, and why?

Luca Micheli (LM) - IT: In terms of productions, I would like to mention, besides "Veleno" and "La Piena", also "Morgana" by storielibere.fm and "Da Costa a Costa", by Francesco Costa, deputy director of the online media "ilPost".

EUROPOD: Future challenges: what do you believe is the main and essential challenge the podcast movement in your country will face in the upcoming 5 years?

Luca Micheli (LM) - IT: In my view, the challenge is to increase the proposal in terms of genres: both fiction and kids-targeted. That is, not to obsess over true crime, for example. And also to innovate in terms of format. From a post-production point of view, a turning point will also be production in Dolby Atmos. Finally, in the future, technological developments are also desirable. For the podcast audience to reach the numbers that radio does. In this sense, for example, it would be relevant to an advancement in listening devices in cars to have the podcast at hand: today, whoever gets into the vehicle, turns on the radio and listens to whatever is streamed. Moreover, after all, the podcast became relevant as such only at the moment Apple created an application to use the medium.

WHO'S WHO: PRODUCERS, EVENTS AND PRODUCTION EXAMPLES

EUROPOD: Could you please list who, in your opinion, are the main five podcast producers – be they independent creators, or companies – in your country?

Luca Micheli (LM) - IT: Chora Media, One Podcast, Rai Play Sound, and the online media *ilPost*. I would also like to mention an independent producer: Jonathan Zenti.

EUROPOD: Which are the 3 best productions in your countries in qualitative terms (post-prod) and why? Can you tell us how you assess the quality of a podcast production?

Luca Micheli (LM) - IT: "*La disciplina di Penelope*" by Chora Media and Rai Play Sound, "*Io ero il milanese*" by Rai Play Sound. My judgement is guided above all by the level of post-production and the care of the sound. But also the quality of the story itself and the writing.

EUROPOD: What are the nationally recognized podcast events (awards, industry meetings) happening in your country?

Luca Micheli (LM) - IT: To me, the main ones are the *DIG Awards* – Podcast category and *ilPod – Italian Podcast Awards*, the latter being the first contest dedicated exclusively to podcasts. In this respect there is perhaps still room for growth. In addition, the Chora Academy should also be mentioned as the first level educational experience dedicated to the medium.

PRODUCTION TOOLS, TECHNIQUE IN YOUR COUNTRY

EUROPOD: Which are the most used editing tools in terms of editing and project management in your country?

Luca Micheli (LM) - IT: Certainly *Reaper* is a widely used free and comprehensive software. Beginners use *Audacity* or *Garageband*. But

also *Ableton*, *Logic* and *Pro Tools* are of common use.

EUROPEAN PERSPECTIVE

EUROPOD: Could you try to sketch what you believe is the main specificity of your country in terms of podcast production, from a European comparative perspective - for instance, genres, formats, other details?

Luca Micheli (LM) - IT NA.

EUROPOD: Is there a specific country in the EU that you consider a reference in terms of podcast production, and why? What is your country lacking to reach that level?

Luca Micheli (LM) - IT: In Europe, I think the BBC is, from a quality point of view, still a benchmark. Moreover, perhaps the comparison should be made, above all, with what happens overseas. Generally speaking, the reference point is the English-speaking world.
